

# Data Exchange – External Partners Applying a Digital Signature to a PDF

October 2018



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**DISCLAIMER:** SSA includes the following instructions for using Adobe, and disclaims any liability caused by your use of this product.

**IMPORTANT:** Before beginning this tutorial, make sure that the document you are digitally signing is in **PDF format**.

## A. Purpose

This procedure establishes the necessary steps for using Adobe Reader or Acrobat Pro to apply a certificate-based digital signature to a PDF document with a pre-placed signature box.

This is a general guide only. Not every agency will have the same screens, errors, or method for applying a digital signature to a PDF. If your agency already provided instructions for applying a digital signature to a PDF document, you should follow your agency's provided instructions.

## B. Applicability

This document establishes the necessary steps for using Adobe Reader or Acrobat Pro to apply a certificate-based digital signature to a data exchange business document PDF, or a scanned PDF document with approved digital signature use.

## C. Requirements

Resources required to complete this procedure include:

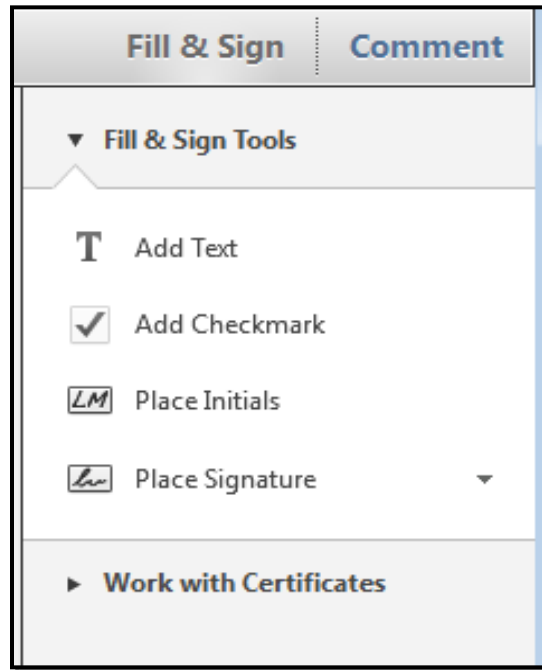
- Adobe Reader or Acrobat Pro.
- The document to be signed in PDF form saved locally on the computer.
- A digital certificate for identity verification.

## D. Required Steps “With” Smart Card Credentials

1. Insert your Smart Card credential into the card reader.
2. Open the PDF file with Adobe Reader or Acrobat Pro.
3. Click on “Fill & Sign” in the upper right hand corner.



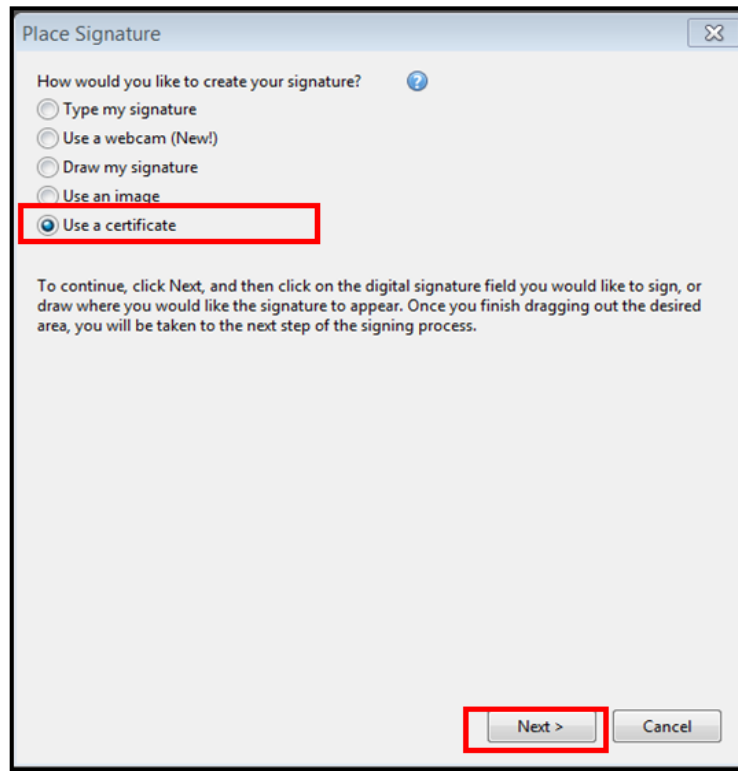
4. The “Fill & Sign” menu will then expand.



5. Click on “Place Signature.”



6. Depending on your version of Adobe, a pop-up window may appear asking you how you would like to create your signature. If you have your Smart Card credential inserted, then choose create your signature with “Use a certificate.” Then press “Next.”



7. A pop-up window will appear. Click on “Drag New Signature Rectangle...”



8. Scroll down through the document to the signature line or where the signature is desired (i.e. – Authorized Signatures and Dates), click and hold the left mouse button, and drag the cursor at an angle away from your starting point.

**NOTE:** The rectangular box should measure out to be the same space of the signature line so that the signature will be an adequate size and is readable.

### Authorized Signature

The signatories below warrant and represent that they have the competent authority on behalf of their respective entities to enter into the obligations set forth in this agreement.

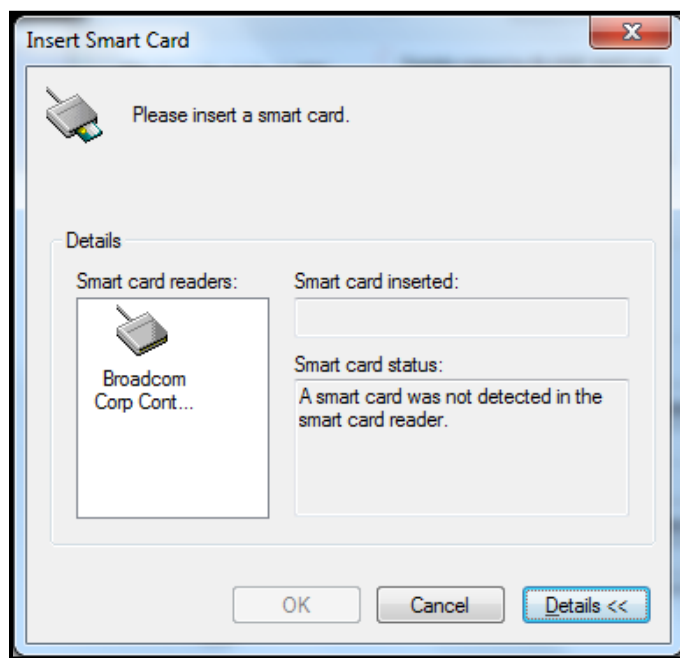
**Electronic Signature Acknowledgement:** The signatories may sign this document electronically by using an approved electronic signature process. Each signatory electronically signing this document agrees that his/her electronic signature has the same legal validity and effect as his/her handwritten signature on the document, and that it has the same meaning as his/her handwritten signature.

### Social Security Administration

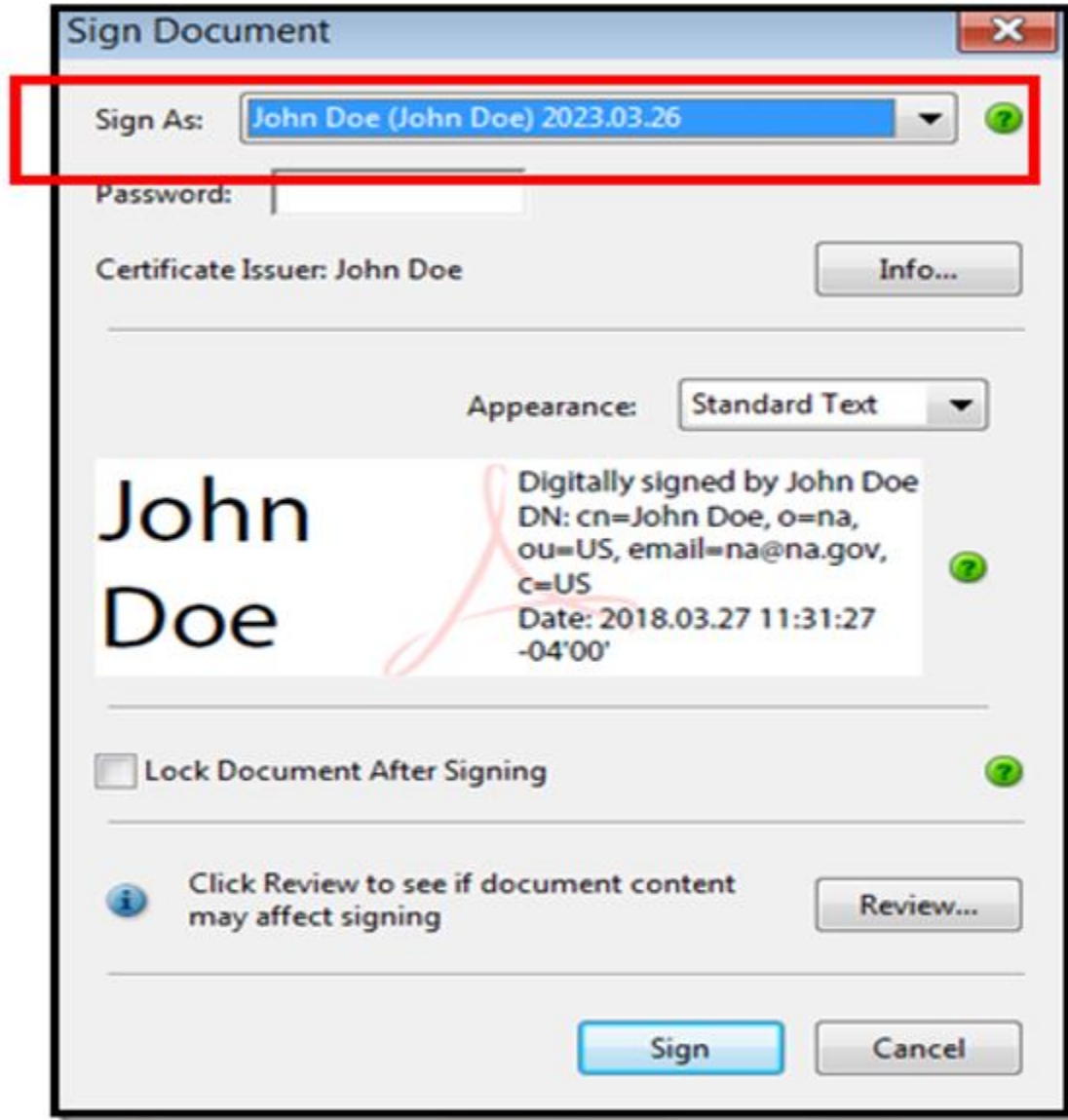


John Doe  
Deputy Commissioner of Nothing

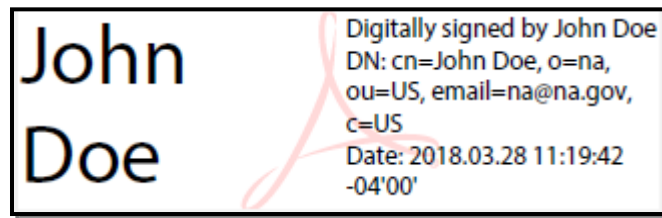
**NOTE:** If you receive the following message (or similar), ensure your Smart Card credential is inserted into the card reader.



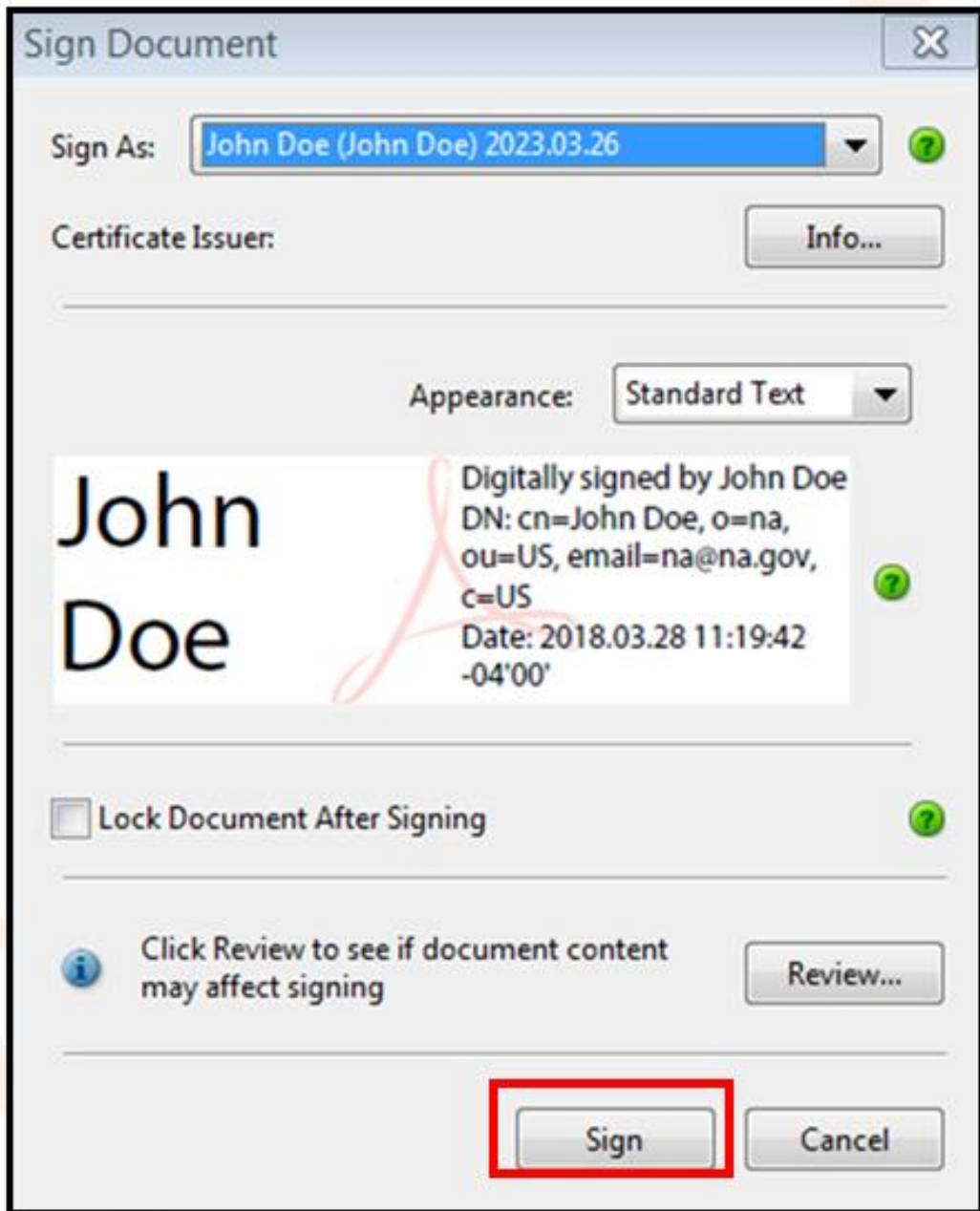
9. A pop-up window will appear. If the “Sign As:” drop down is not already populated with your credentials, use the drop down menu to select your credential.



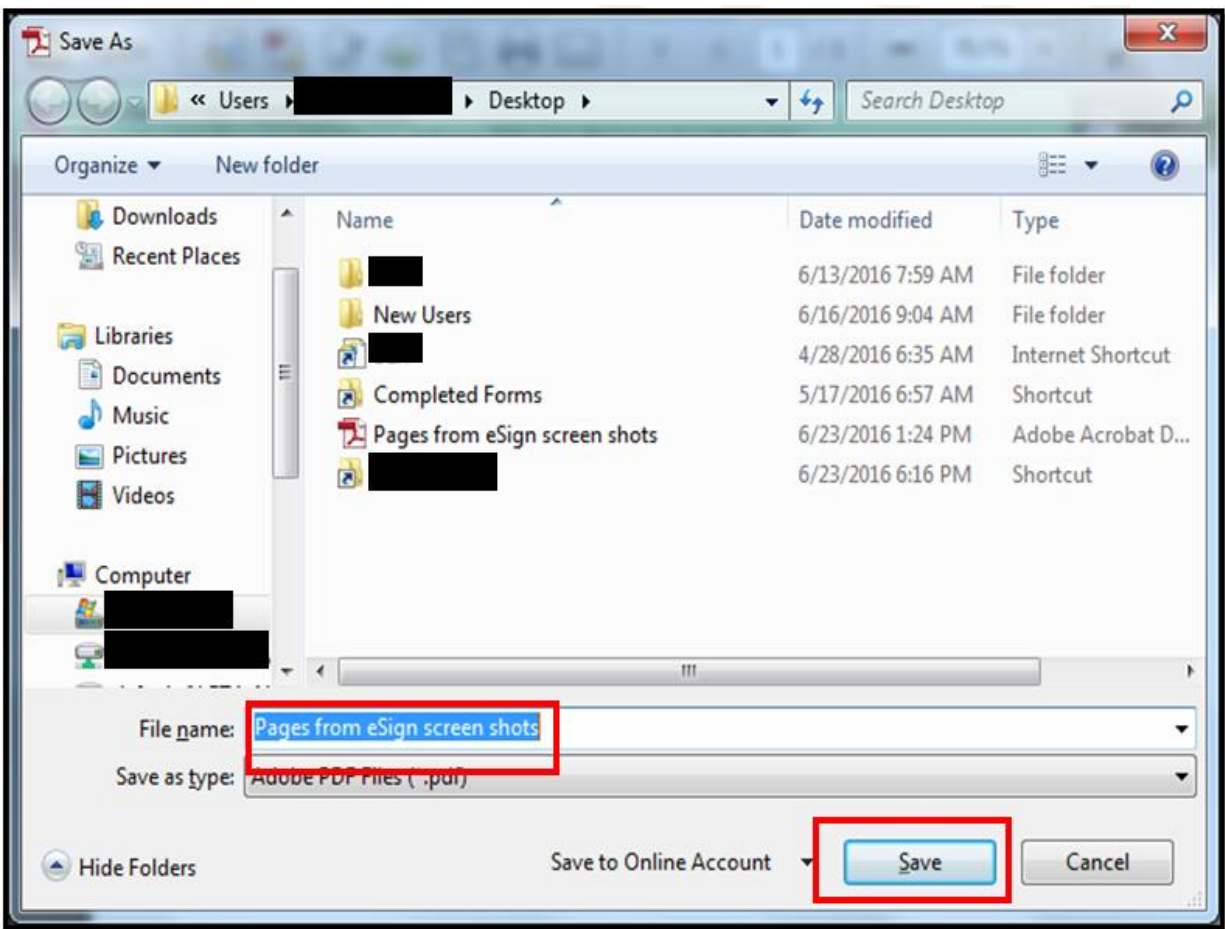
- a. If your credential does not appear, verify your Smart Card credential is in the card reader, then on the drop down menu select “Refresh ID List.”
- b. The signature appearance will look similar to the example below.



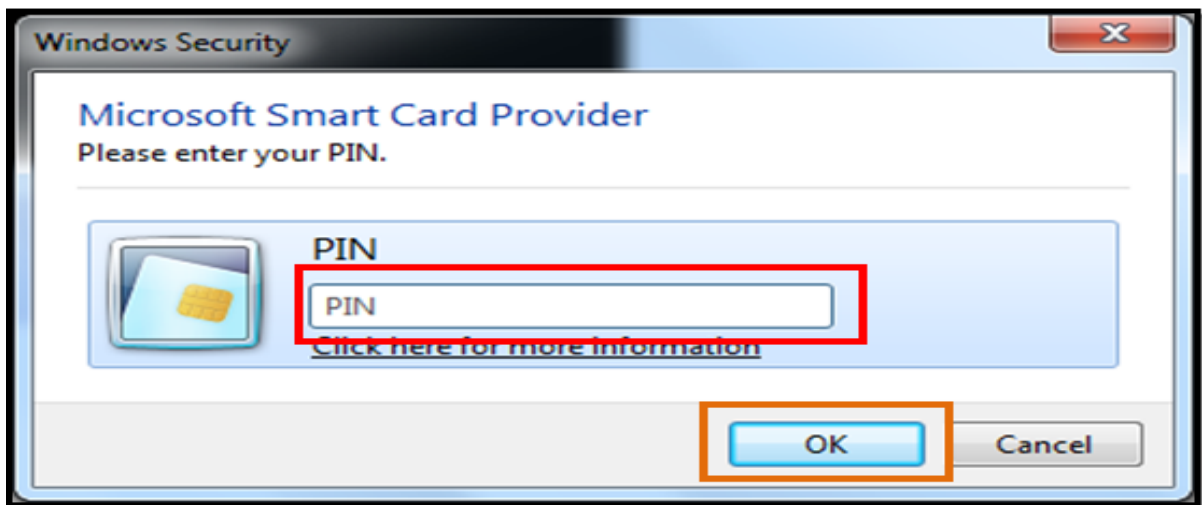
10. Verify the displayed information is correct. Click “Sign.”



11. The system will prompt you to save the document. You can save the document with its current name or rename the document. Save the document.



12. A new pop-up window will appear prompting you to enter the PIN associated with your Smart Card credential. Enter the PIN and select "OK."



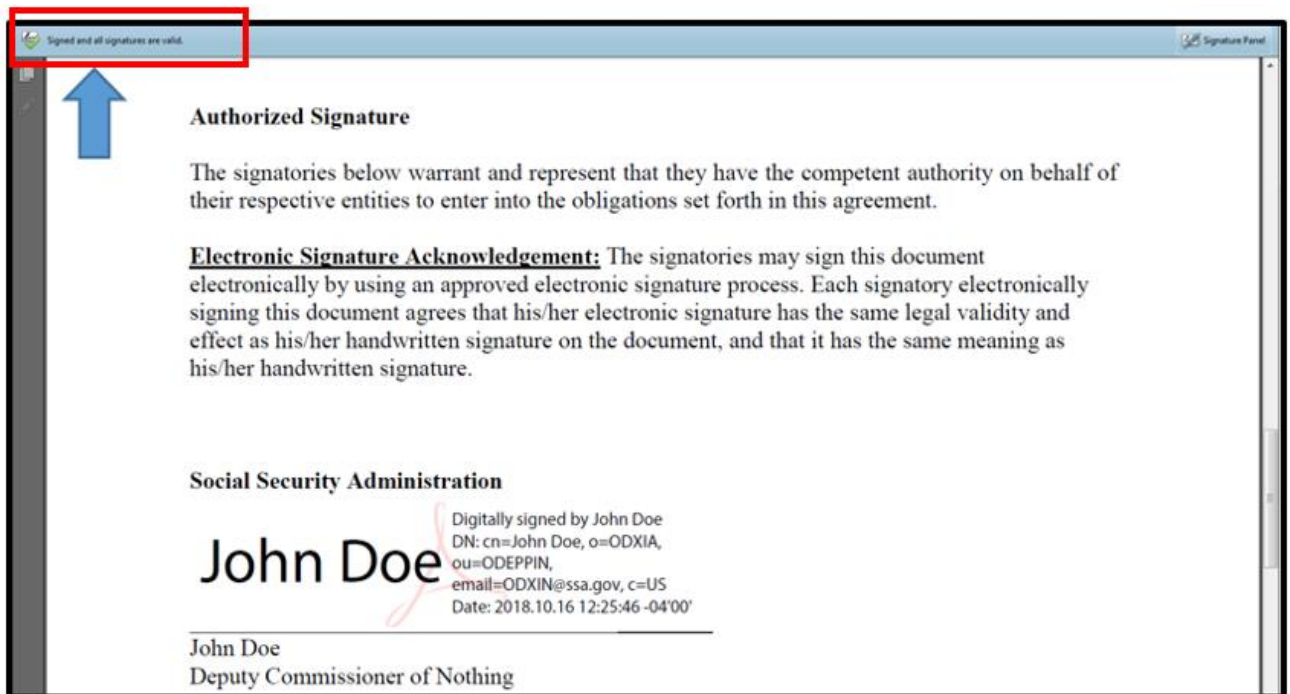


13. After entering your PIN, the digital signature will appear in place of the rectangle.

When all signatures are valid, a message will display that the document is “Signed and all signatures are valid.” (Refer to example below).

**NOTE:** The “Signed and all signatures are valid” may not always appear. If your digital signature still appears in place of the rectangle, you may proceed.

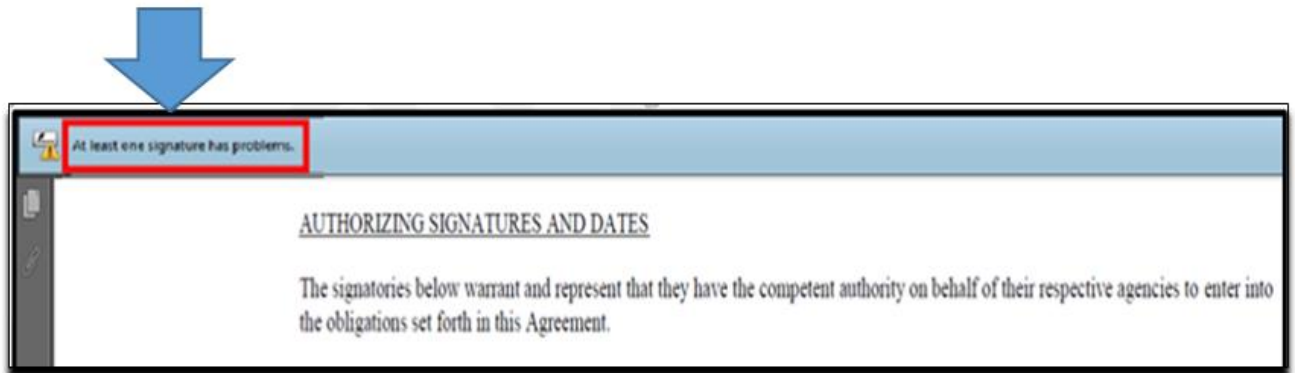
**(Signed and all signatures are valid)**



14. When the document is signed and all signatures are valid, save the document and return to the requestor.

**NOTE:** If there are problems with at least one signature, a message will display reading “At least one signature has problems.” (Refer to example below.) If this happens with your signature, you should try electronically signing again or correct the issues before sending to the requestor. Otherwise, the signature will not be considered valid, and you must electronically sign again beginning with **step #1**.

(At least one signature has problems)

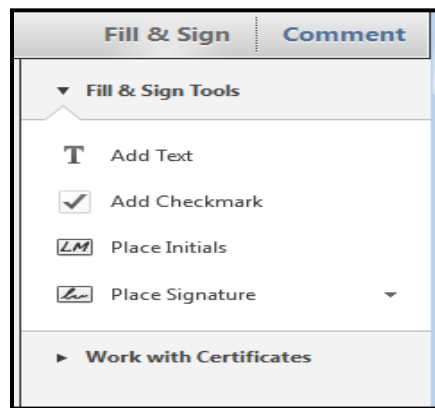


## E. Required Steps “Without” Smart Card Credentials

1. Open the PDF file with Adobe Acrobat or Adobe Reader Pro.
2. Click on “Fill & Sign” in the upper right hand corner.



3. The “Fill & Sign” menu will then expand.



4. Click on “Place Signature.”



5. A pop-up window will appear. Click on “Drag New Signature Rectangle.”



6. Scroll down through the document to the signature line or where the signature is desired (i.e. – Authorized Signatures and Dates), click and hold the left mouse button, and drag the cursor at an angle away from your starting point.


**NOTE:** The rectangular box should measure out to be the same space of the signature line so that the signature will be an adequate size and is readable.

**Authorized Signature**

The signatories below warrant and represent that they have the competent authority on behalf of their respective entities to enter into the obligations set forth in this agreement.

**Electronic Signature Acknowledgement:** The signatories may sign this document electronically by using an approved electronic signature process. Each signatory electronically signing this document agrees that his/her electronic signature has the same legal validity and effect as his/her handwritten signature on the document, and that it has the same meaning as his/her handwritten signature.

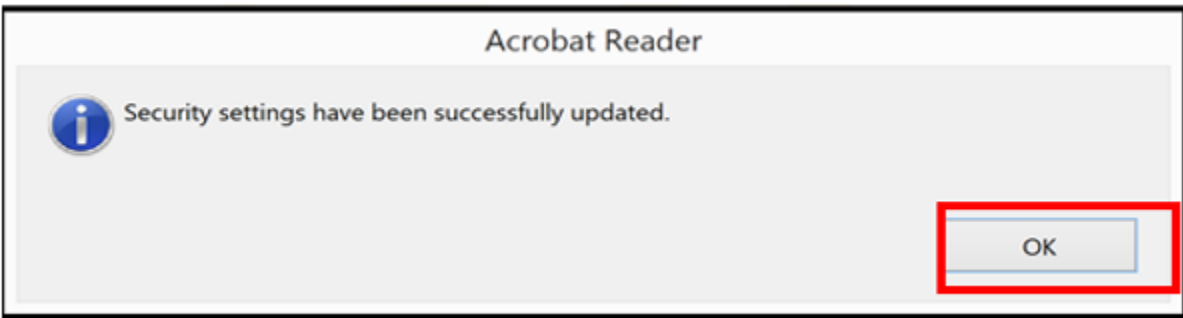
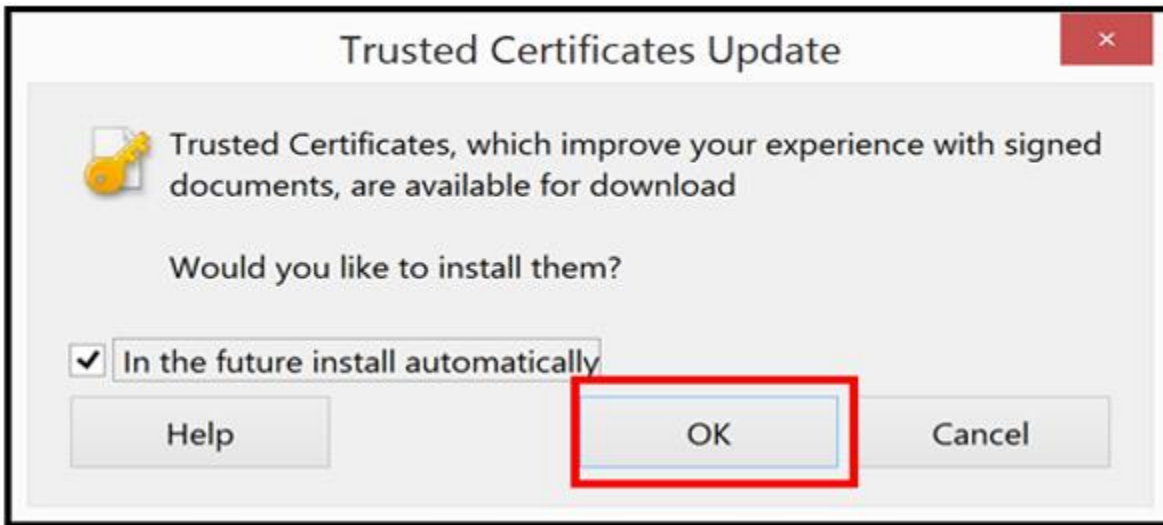
**Social Security Administration**



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John Doe  
Deputy Commissioner of Nothing

7. If you receive one of the following messages below (or a similar message), click “OK” to proceed.



8. If you previously created a digital signature then select that signature in the dropdown from the “Sign As” line and click “Sign” and skip to step 15.

**Note:** You will need to know the password you created when you initially created this signature in order to use your previous signature. If you do not remember your password, you will have to create a new signature. Go to **Step #9**, if you do not remember your password.

**Sign Document**

Sign As: **John Doe (John Doe) 2023.03.26**

Password:

Certificate Issuer: John Doe **Info...**

Appearance: **Standard Text**

**John Doe**

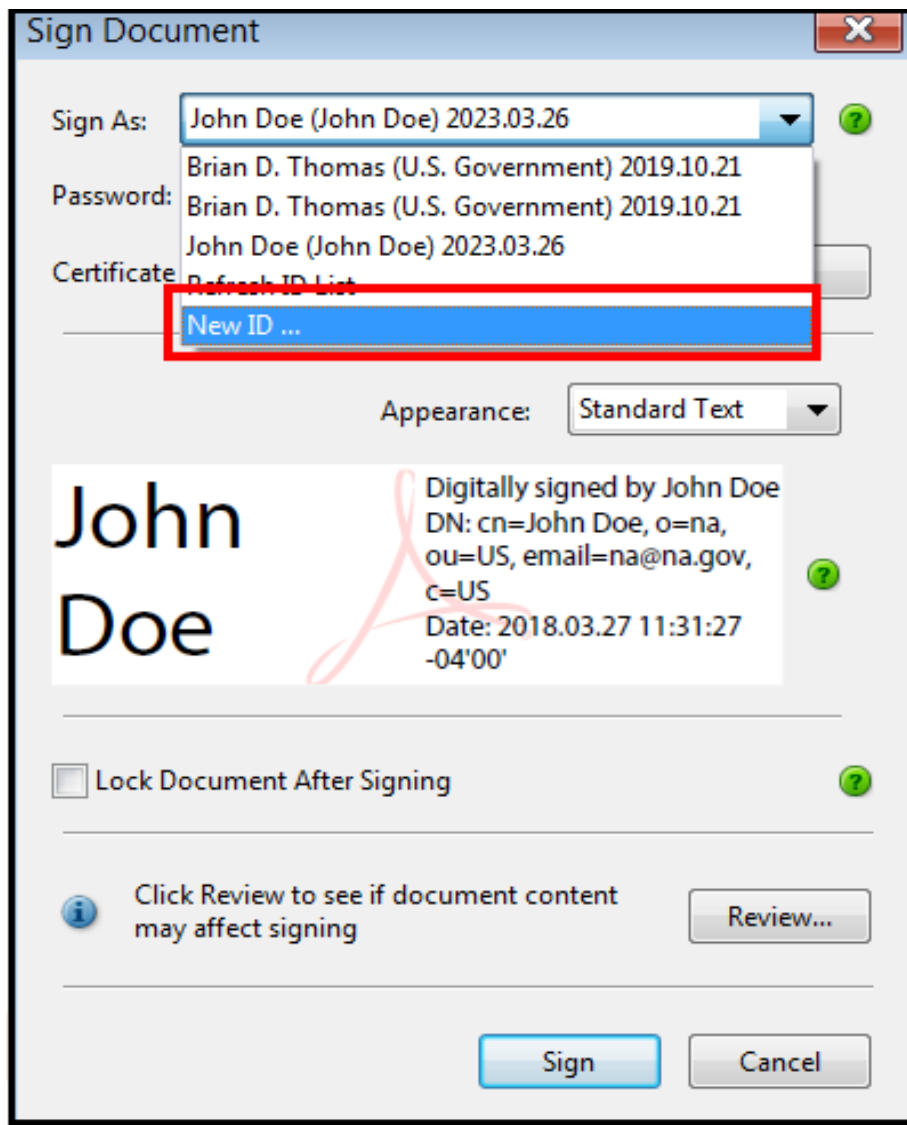
Digitally signed by John Doe  
DN: cn=John Doe, o=na, ou=US, email=na@na.gov, c=US  
Date: 2018.03.27 11:31:27 -04'00'

☐ Lock Document After Signing

**i** Click Review to see if document content may affect signing **Review...**

**Sign** **Cancel**

9. If this is your first use of a digital signature, from the “Sign As” box select “New ID...”



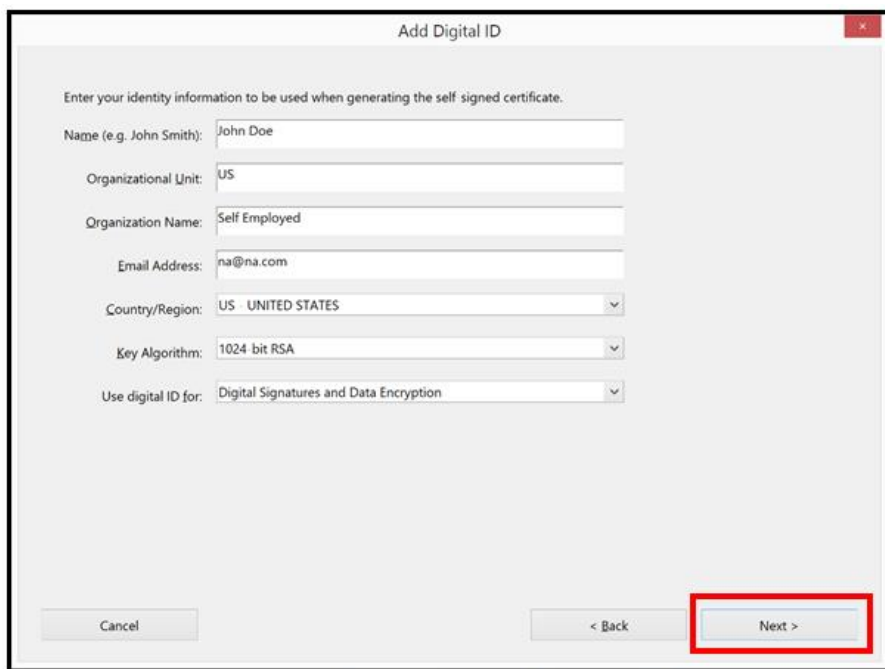
10. A second pop-up window will appear “Add Digital ID.” Select the radio button for “A new digital ID I want to create now.” Click “Next.”



11. A pop-up window will appear. If not already selected, select the radio button for “New PKCS#12 digital ID file.” Click “Next.”



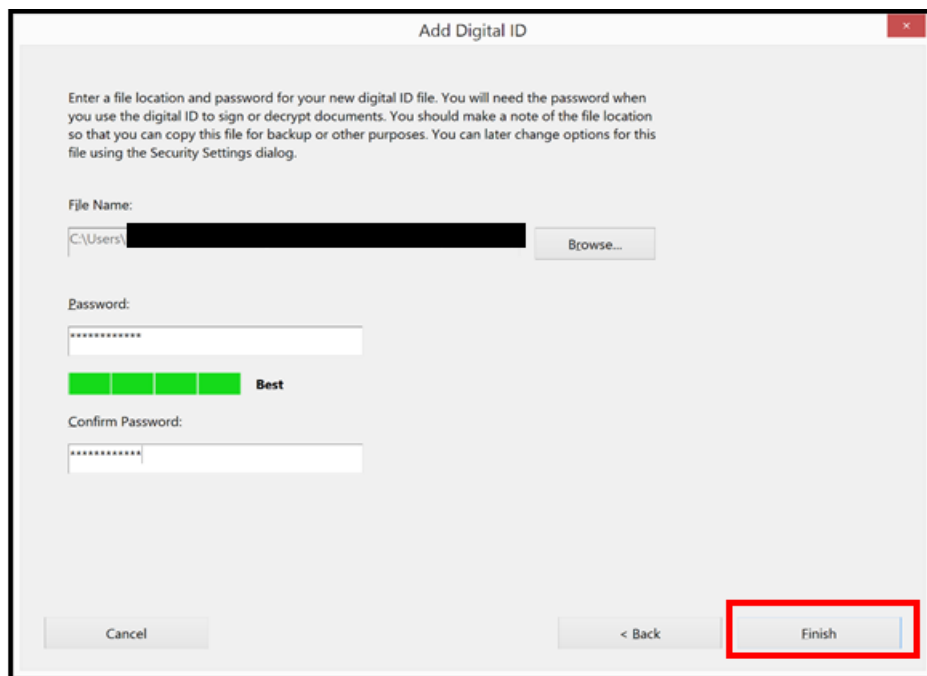
12. A new pop-up window will appear. Complete the fields on the form with the applicable information. Once completed click “Next.”



The screenshot shows a window titled "Add Digital ID" with a close button in the top right corner. Below the title bar, there is a text prompt: "Enter your identity information to be used when generating the self signed certificate." The form contains several fields: "Name (e.g. John Smith):" with the value "John Doe", "Organizational Unit:" with the value "US", "Organization Name:" with the value "Self Employed", "Email Address:" with the value "na@na.com", "Country/Region:" with a dropdown menu showing "US UNITED STATES", "Key Algorithm:" with a dropdown menu showing "1024 bit RSA", and "Use digital ID for:" with a dropdown menu showing "Digital Signatures and Data Encryption". At the bottom of the window, there are three buttons: "Cancel", "< Back", and "Next >". The "Next >" button is highlighted with a red rectangular box.

13. A new pop-up window will appear prompting you to create a password associated with the digital signature. Enter a password, confirm the password, and select “Finish.”

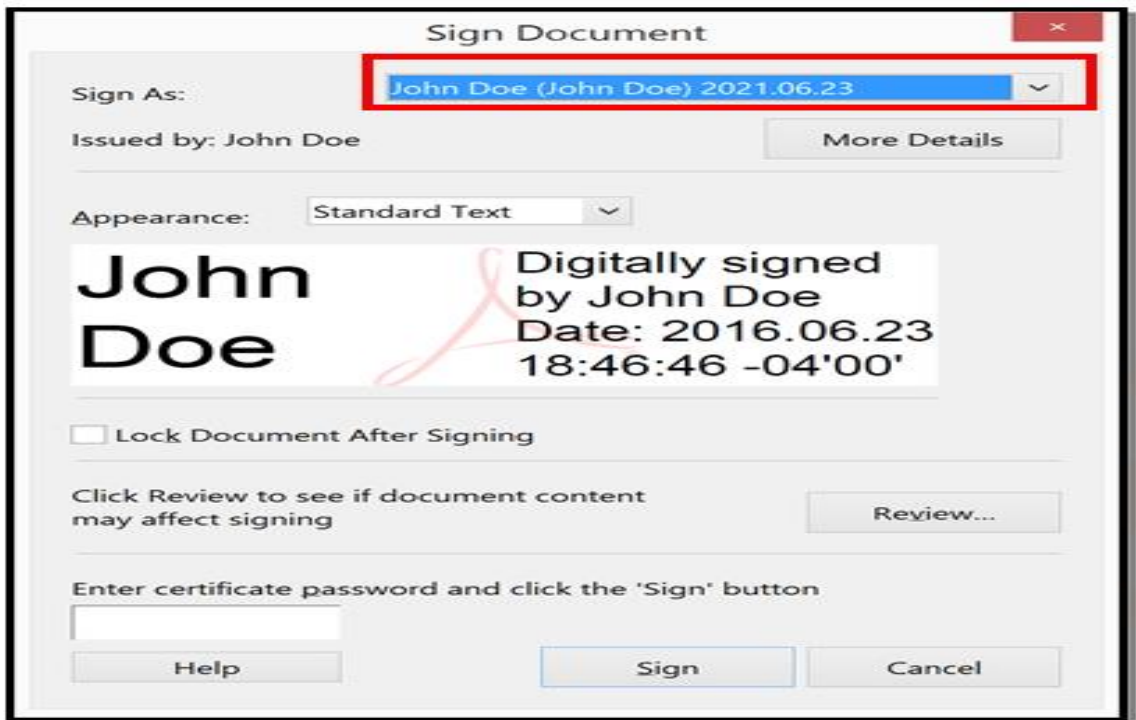
**NOTE:** You must remember the password you created for future electronic signing.



The screenshot shows a window titled "Add Digital ID" with a close button in the top right corner. Below the title bar, there is a text prompt: "Enter a file location and password for your new digital ID file. You will need the password when you use the digital ID to sign or decrypt documents. You should make a note of the file location so that you can copy this file for backup or other purposes. You can later change options for this file using the Security Settings dialog." The form contains several fields: "File Name:" with a text box showing "C:\Users\" and a "Browse..." button, "Password:" with a text box showing "\*\*\*\*\*", a password strength indicator showing four green bars and the word "Best", and "Confirm Password:" with a text box showing "\*\*\*\*\*". At the bottom of the window, there are three buttons: "Cancel", "< Back", and "Finish". The "Finish" button is highlighted with a red rectangular box.



14. If the “Sign As” drop down is not already populated, use the drop down menu to select the digital signature.

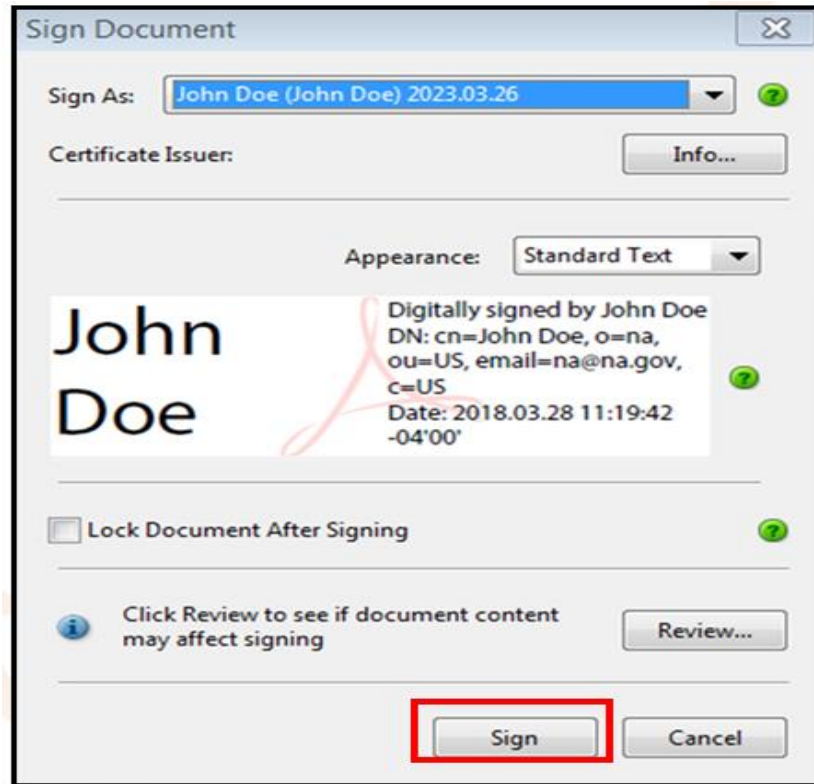


The signature appearance will look similar to the example below:

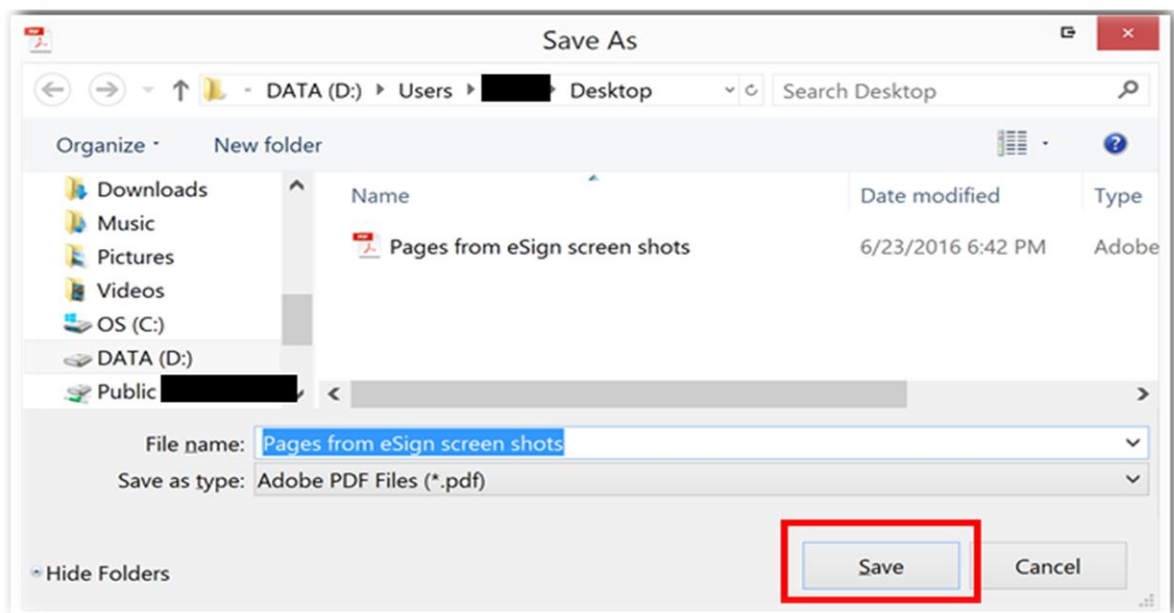


15. Verify the displayed information is correct. Enter the password you created and click “Sign.”

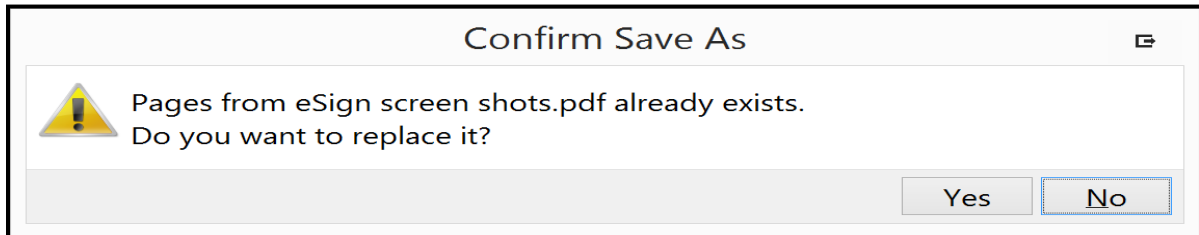
**NOTE:** If the information is not correct, **do not** click “sign.” Go back to **step #9** and begin the process of creating a signature.



16. The system prompts you to save the document. Save the document.



**NOTE:** If you do not change the name or location of your document when you save it, you will receive the following message. If you are ok with overwriting the unsigned version, click “Yes.” If not, click “No,” and change the name of the document before saving.

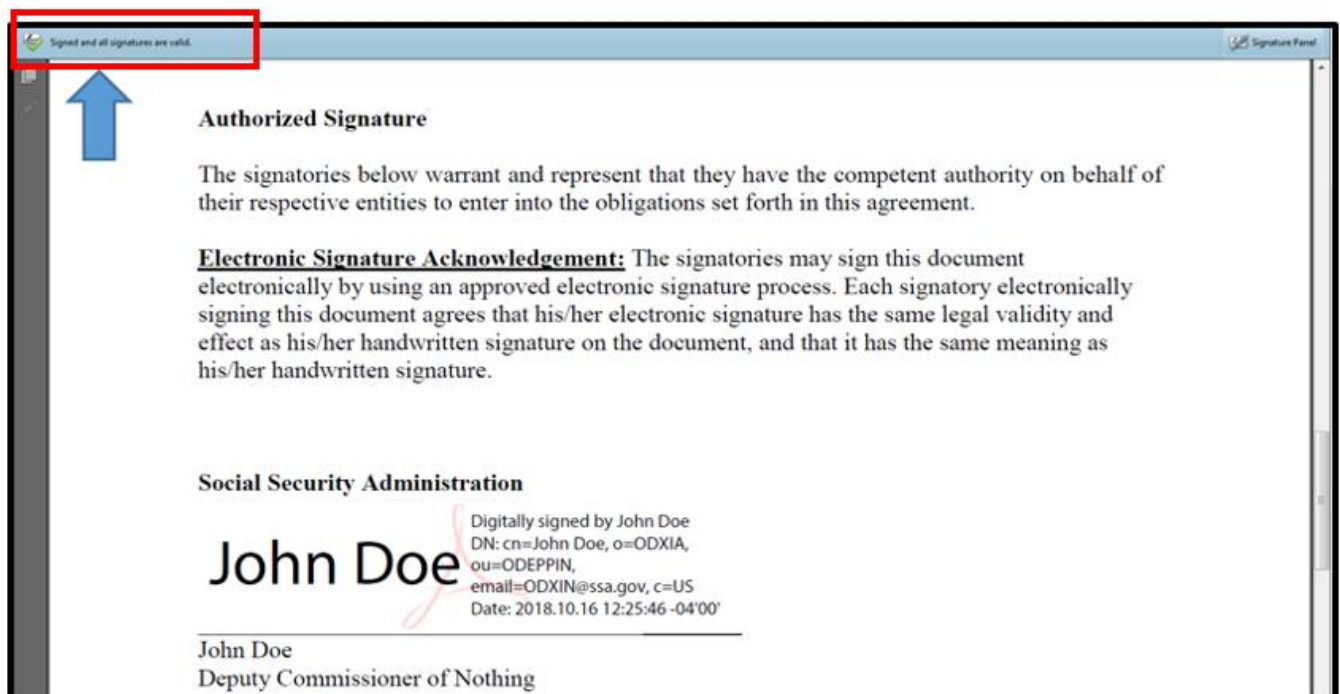


17. After signing the document, the digital signature will appear in place of the rectangle.

When all signatures are valid, a message will display that the document is “Signed and all signatures are valid.” (Refer to example below).

**NOTE:** The “Signed and all signatures are valid” may not always appear. If your digital signature still appears in place of the rectangle, you may proceed.

**(Signed and all signatures are valid)**



18. When you sign the document and all signatures are valid, save the document and return to the requestor.

**NOTE:** If there are problems with at least one signature, a message will display reading “At least one signature has problems.” (Refer to example below.) If this happens with your signature, you should try signing again or correct the issues before sending to the requestor. Otherwise, the signature is not valid. Go back to **step #13** and try again.

(At least one signature has problems)

